

Appendix 2

Element 1 Requests

- a) **Page 41 of Massachusetts' Framework for Action Self Assessment Tool**
- b) **Massachusetts State Action Plan (2004)**

Framework for Action: Building a Fully Coordinated Transportation System
Assessment and Planning Meeting Summary

May 6, 2004
9:30 a.m. to 3:30 p.m.
Transportation Building
10 Park Plaza, 2nd Floor
Conference Room #4
Boston, MA

Purpose and Meeting Outcome: To develop strategies and an action plan to better coordinate public and private human service transportation services in Massachusetts.

Attendees: See attached list

Sponsors: Ms. Claire T. Ghiloni
Project Leader
Human Service Transportation

And

Ms. Joanne Champa
Acting Deputy Secretary for Transit
Executive Office of Transportation & Construction

Facilitator: Ms. Jo Ann Hutchinson, State Ambassador
Community Transportation Association of America

Meeting Outcomes and Actions Taken

Welcome and Introductions

Claire Ghiloni welcomed everyone to the meeting and provided an overview of the February 2004 United We Ride meeting where States met and discussed ways they could move forward in the coordination of human service transportation. She explained the purpose of today's planning session is to utilize the Framework for Action tools provided at the Federal level to assess the State's coordination efforts and to develop an Action Plan for the future to improve coordinated transportation in Massachusetts.

Claire introduced Ms. _____, (I failed to get name and title for the person welcoming us)

Introduction of Facilitator

Claire Ghiloni introduced Jo Ann Hutchinson with the Community Transportation Association of America who would serve as the Facilitator for today's planning session.

Jo Ann expressed her appreciation to Claire and all the others who had worked hard to set up today's meeting and indicated that Massachusetts is one of the first states to set up such a session following the United We Ride Leadership Conference. She indicated the meeting agenda was tight but by the end of the day we would have an Action Plan and directions to move forward.

State Coordination Example

Jo Ann indicated she had been requested to provide a brief overview of a State coordination program. Having recently retired as the Executive Director of the Florida Commission for the Transportation Disadvantaged, she provided a brief overview of the success of this program over the past 20 years. Florida is one of many States who has legislation requiring coordination of human service transportation

and is one of a few who now has a dedicated trust fund (i.e. Transportation Disadvantaged Trust Fund) to assist with the coordination activities and the growing unmet needs for those without mobility. She explained the history of the program, progress made and highlighted the unity between agencies, providers, consumers, business community and others that has made the program a success. She announced the recent action by the Medicaid Agency to contract with the Commission to administer the State Non-emergency Medicaid Transportation Program. She stressed that the Florida model is one model and there is no one right way to carry out coordination activities. She provided a handout and indicated more information on the program can be obtained on line at: www.myflorida.com/ctd. Jo Ann also noted the 5 states who received State Leadership Awards at the United We Ride Leadership Meeting in February. They were: Florida, Maryland, North Carolina, Ohio and Washington State. She referred to a handout that provided an overview of the awards and contact information.

Self Introductions

Jo Ann requested that everyone introduce themselves, who they represent and to indicate a "c" word that can be associated with effective coordination. This exercise provided a fun way to identify the many ways that coordination can work. The words reported included: *currency, communication, cost effective, community, "can do", consumer, consensus, courtesy, collaboration, caring, consistent, collective, creative, constructive, conscientious, common sense, courageous, complex, computer technology, continuity and crazy.*

Agenda Review

Jo Ann received consensus on rules for the day that included: listening, allowing every person to speak and being respectful to each other. She also referred to the meeting packets that contained much information about United We Ride, technical assistance, Transit Bus Passes, Brokerages and other information relating to coordination of human service transportation. She reviewed the agenda and received consensus.

United We Ride Overview

Jo Ann introduced Dick Doyle, Regional Administrator for the Federal Transit Administration. Dick thanked everyone for coming and for Jo Ann providing today's facilitation. He provided an overview of the federal United We Ride Initiative consisting of 5 parts: (1) A Framework for Action publication based on input by an expert panel who met in August 2003. The tool provides self-assessment tools to assist both States and communities; (2) State Leadership Awards recognizing States who have made significant progress in coordinated transportation; (3) National Leadership Forum that was held in February 2004 where State leaders met and discussed steps to improve human service transportation services; (4) State Coordination Grants that will be available for States to apply in May or June 2004 and (5) Help Along the Way that is a technical assistance program to build on the work of other national technical assistance programs. He indicated Federal coordination grants should be available in the near future for States to apply for to assist with their coordination programs. He felt progress has been made in Massachusetts but more is needed, especially in the Transit Bus Pass area. He was hopeful to come up with an Action Plan today and looks forward to working with everyone as the coordination program moves forward.

Individual Assessments

Jo Ann indicated this part of the agenda was for each individual to personally assess where they are in Massachusetts in human service coordination. Utilizing the six sections outlined in the invitation letter and the Framework for Action tools, everyone was requested to team up with 2-3 others that they may not work with on a regular basis and to discuss where they think they are as far as the areas they have done well and to indicate why they believe the success has occurred. The group was requested to reconvene in thirty minutes. A reporter is needed to report the findings.

The following is a summary of the reported areas of "done well" and what were the contributing factors in each of the areas, as well as areas that improvement is needed and how:

Making Things Happen by Leadership and Partnership

Done Well

→Positive Momentum

Contributing Factors

→There is an entity established providing awareness

→Possibility of expansion

Do Better

- Identification by Governor that HST is a priority
- Better utilization of existing transportation resources
- Collaboration with public agencies
- Lack of independent council or Commission to take leadership Role and to develop a statewide Plan for human service transportation coordination
- Identify state working group to accomplish tasks
- Identify what is in place
- Develop cost assessment
- Develop bus pass program
- Involve planning in coordination
- Work with counties who have different rules
- Evaluate cost efficiencies and cost effectiveness
- Lack of data on public funded vehicles and how they are used
- Use more volunteers
- Address insurance and liability issues

How It Can Be Accomplished

- Governor issue Executive Order creating council or commission to implement statewide human service coordination
- Develop uniform methodology for common needs identification and resources
- Develop statewide bus pass program
- HST agency take lead on coordination and be provided adequate resources
- Draft legislation to ensure coordination program is part of a stable infrastructure, has dedicated funding and will advocate for those in need of transportation
- Develop Governor's Executive Order and legislation
- Conduct transportation inventory and utilization ✓
- Pull in fixed route and other groups to work on solutions
- Involve land use and other transportation professionals to help
- Create dedicated trust fund to meet anticipated growing needs
- F/V study – HST??????
- Include workforce boards in process
- Fund pilot projects and showcase best practices
- Review and document benefits of coordinated transportation, both economic and cost savings to other areas

Taking Stock of State Needs and Moving Forward

Done Well

- Coordination of 3 agencies to-date(DMA, DMR.DPH)
- Data collection that can be expanded

Contributing Factors

- Professionalism of Middle Managers
- Commitment by agencies involved

Do Better

- Consolidate funding application process
- Identify other groups working in these areas
- Identify needs and services provided
- Utilize existing transportation (EOTC) for coordination

How It Can Be Accomplished

- Review and change planning processes

Putting Customers First

Done Well

- Statewide Consumer

Contributing Factors

- Mandate of service

Assessments/surveys

- Local consumer input
- Identifying Resources
- Local area advisory groups

Do Better

- Travel Training
- Lack of toll free access for customer needs
- Lack of misunderstanding on marketing of services
- Lack of assessment of who are the customers or populations
- Improve relationships with transit agencies
- Lack of access to bus passes for seniors and others

How It Can Be Accomplished

- Create and train volunteers
- Focus on customer (on time performance, reliability, electronic card)
- Create feedback process from customers
- Measure services (define performance)
- Develop uniform standards that don't impact delivery of services
- Create statewide bus pass program

Adapting Funding for Greater Mobility

Done Well

- Coordination with DMR/DMA in particular
- Reporting procedures in place (track amount of \$ being spent; # of trips, etc.)

Contributing Factors

- Lack of funding
- Work with brokers
- Quality Service

Do Better

- Educate participants
- Lack of dedicated trust fund
- Put client needs first

How It Can Be Accomplished

- Create trust fund to meet needs of those not sponsored
- Design and redesign system
- Maximize transportation planning
- Seek private pay as another funding source

Technology Moves Coordination to the Next Level

Done Well

- Development & implementation of scheduling software
- utilization of mapping software
- trip analysis; web-based software-origins/destinations
- fare payment systems (smart cards)

Contributing Factors

- MONEY
- Easy to use
- 5310 funds available for computers
- CMAQ funding
- Earmarks for ATJ

Do Better

- Lack of GPS Technology
- SVC for particular areas
- Access→→Data

How It Can Be Accomplished

- Require more GPS technology
- Utilize planning agencies who have technology

Moving People Efficiently

Done Well

- Coordinated RFP for 3 agencies
- Consistent HS areas
- Brokers
- Cape Cod-Boston medical service
- Advanced scheduling of medical appointments

Contributing Factors

- Commitment to customers
- Agencies committed to initiative

<i>Do Better</i>	<i>How It Can Be Accomplished</i>
→Education	→Have single point of contact
→Volunteer utilization (escorts, etc)	→Use the media and other outlets to gain support
→Broker more transportation	→Create network of providers and needs

Action Plan for Coordinated Transportation – Massachusetts

Priorities	Responsible Party	Timeframe
Draft Governor's Executive Order creating an independent Commission, membership and assigned tasks to further the coordination of human service transportation.	Claire, Barry, Dick, Joanne, Irvin, Fran, Emmett, Larry (AEF)	3 months to draft (September 2004) 3 months to implement (January 2005)
Draft legislation to codify Commission created by Executive Order.	Legal counsel Membership identified in Governor's Executive Order.	9 months (February 2005)
Draft legislation to create a trust fund to carry out statewide coordinated transportation and to sponsor trips not funded by other funding sources to those citizens with no access to medical, employment, nutritional or other life-sustaining services.	Independent Commission. advocacy groups, Fran	3 months (September 2004)
Deploy Transit Bus Pass Program	Dick Doyle, Ed, Larry, Chalita, Vera, Emmett, Tammy. MARTA	4 months (October 2004)
Collect and release data relevant to current HST activity	Jim, Donna, Claire, Penny, Chalita, Sandy	3 months (September 2004)